



Use MTCS to Solve Reporting Problems





Use MTCS to solve reporting problems

You will be able to:

- Identify reporting rates
- Access Proforma and Ad Hoc reports
- Understand how to use MTCS to monitor PHA performance





Field Office inquiry #1

A colleague within your office calls you to ask:

“How do I find out if my Field Office has met its goal for MTCS reporting?”






Resident Characteristics report

- Identifies reporting rate
- Provides aggregate demographic and income information
- Identifies number of families who receive assistance
- Provides characteristics of households the PHA serves

Use the Resident Characteristics report to identify whether your Field Office has met its Business Operation Plan (BOP) goal for MTCS reporting and if a PHA met its reporting requirement.

The **Resident Characteristics report**:

- Identifies the percentage of Form HUD-50058s reported for Public Housing and Section 8
 - Provides aggregate demographic and income information that can help Field Offices and TARC's analyze PHA operations
-  MTCS calculates the percent reported with the number reported divided by total occupied units. HUD requires Field Offices and TARC's to achieve 85 percent aggregate reporting in their BOP.
-  Information on the Resident Characteristics report will depend on the Level of Information and program you select in the *Selection Menu* screen of MTCS.
-  Some MTCS BOP goals are calculated by State and other MTCS BOP goals are calculated by Field Office.



Access Resident Characteristics report

Multifamily Tenant Characteristics System
Main Menu

Enter the following information, then click on the GO button.

☒ **MTCS Reports**

☐ **Ad Hoc Selection**

If you select "Transmission Status...", enter HA Mailbox ID.
If you select "Send File", enter both HA Mailbox ID and Return Mailbox ID.

☐ **Transmission Status,
Error Report, or
Analysis Report** HA Mailbox ID

☐ **Send File** Return Mailbox ID

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¹[MTCS Website](#)

To retrieve the **Resident Characteristics report**:

- Select **MTCS Reports** from the *Main Menu* (**MTCS Reports** is the default selection)
- Click **GO**

The *Selection Menu* appears on your screen.



Selection Menu

**Multifamily Tenant Characteristics System
Selection Menu**

Program Selection

| | |
|------------------------------|-------------------------------------|
| Public Housing | <input checked="" type="checkbox"/> |
| Indian Mutual Help | <input type="checkbox"/> |
| Indian Rental | <input type="checkbox"/> |
| S8 Certificates | <input type="checkbox"/> |
| S8 Vouchers | <input type="checkbox"/> |
| S8 Moderate Rehabilitation | <input type="checkbox"/> |
| All Offices of PIH Programs | <input type="checkbox"/> |
| Public and Indian Housing | <input type="checkbox"/> |
| Indian Housing | <input type="checkbox"/> |
| S8 Vouchers and Certificates | <input type="checkbox"/> |

Level of Information

☐ National
☐ State
☐ Field Office
☐ MSA
☐ County
☐ City or Locality
☐ Housing Agency
☐ Project
☐ Congressional District

To make selections for all reports:

- Select a **Program** from the *Selection Menu* (**Public Housing** is the default program selection)
- Select **Field Office** from the **Level of Information** from the *Selection Menu*

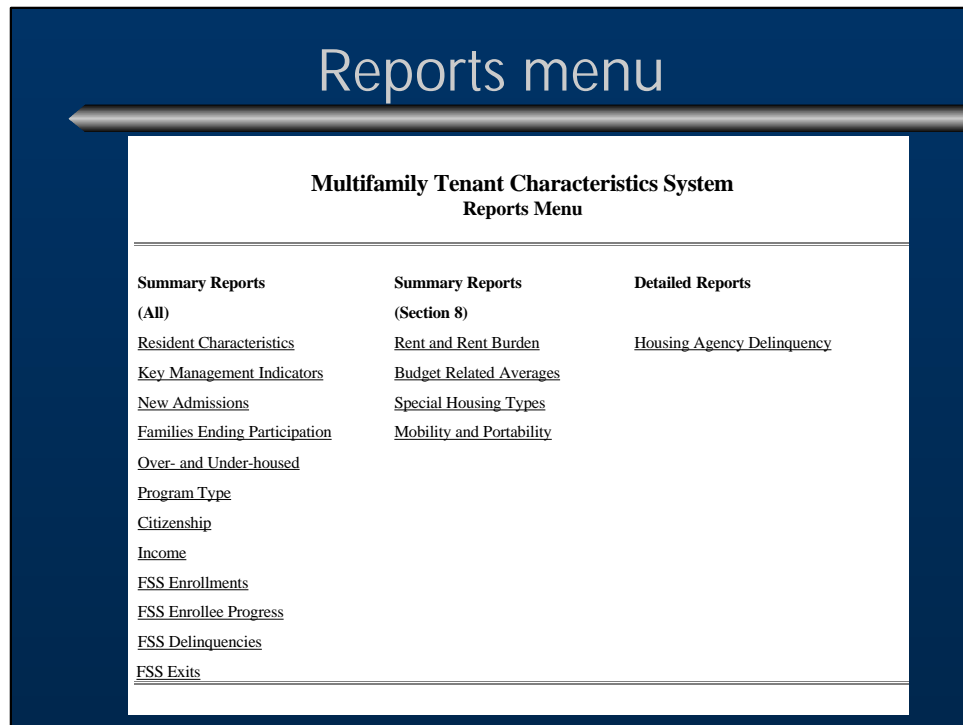
The *Selection Menu* remains on your screen.



On the *Selection Menu* screen, MTCS will prompt you to select additional levels of information to further narrow your search parameters based on the **Level of Information** you selected.

- Select the **Field Office**
- Click **Report Menu**

The *Report Menu* appears on your screen.



To view the report:

- Select **Resident Characteristics** from the *Reports Menu*

The **Resident Characteristics report** appears on your screen.



The list of reports available depends on the Program and the Level of Information you selected. For example, if you select Public Housing, MTCS will not display the Section 8 Summary reports.



Detail reports are not available at the Field Office Level except for the Housing Agency Delinquency report.



Key data fields

- Total Available Units
- Total Occupied Units
- Percent Reported

Check the **Resident Characteristics report** to determine the PHA's reporting rate. If you disagree with the report, you need to look at total occupied and total available units. If these numbers are too high or too low, data in these fields may skew the PHA's reporting rate. The key data fields within the **Resident Characteristics report** include:

Total Available Units refers to the total number of Public Housing units available from IBS and the total number of Section 8 contracted units from HUDCAPS.

Total Occupied Units reflects the total number of occupied units for Public Housing from IBS and for Section 8 from HUDCAPS.

Percent Reported identifies the percentage of Form HUD-50058s reported for Public Housing and Section 8.



HUDCAPS receives data from the PHA's Year-End-Statement. IBS receives data from the Form HUD-51234. MTCS receives data from HUDCAPS quarterly and IBS weekly.



PHAs may contact you to correct the data in HUDCAPS and IBS.



Small group exercise

Situation #1:

Your director wants to know the progress of the FO or TARC BOP goal for MTCS reporting.

How do you find the information and what do you tell your director?



More information

- HA Delinquency report
- New Admissions report
- Families Ending Participation report
- Over and Under Housed report
- Income report
- Citizenship report
- Program Type report

You can retrieve other reports to obtain more information about fields on the Resident Characteristics report:

HA Delinquency report provides detailed information about reporting rates for Form HUD-50058 submissions. Use this report to evaluate PHA reporting rates as noted in the Notice PIH 99-2.

New Admissions report provides demographic and income information for households admitted during the last 12 months.

Families Ending Participation report provides demographic and income information for families who ended participation during the last 12 months.

Over and Under Housed report summarizes the characteristics of all households who are over or under housed by household types, race, and ethnicity.

Income report summarizes information about the income of families who reside in Public Housing, Indian Housing, or who receive Section 8 assistance.

Citizenship report summarizes information about the citizenship of families who reside in Public Housing, Indian Housing, or who receive Section 8 assistance.

Program Type report provides a comparison of available or occupied units to reported units for each program type in a single report.



Field Office inquiry #2

A colleague asks you:

"It is time for the semi-annual assessment of the Public Housing Agency reporting rates to determine who is subject to sanctions. Where do I find the Public Housing Agencies' reporting rates?"



HA Delinquency report

- Provides PHA reporting rates for Form HUD-50058 submissions
- Use report to determine if PHA subject to sanctions

To assess a PHA's performance, Field Offices and TARC's use the **HA Delinquency report** to monitor the number of Forms submitted last month, last 3 months and last 6 months. The **HA Delinquency report** includes all data submitted in the last 18 months.

The information on this report is the same as the information on the monthly Delinquency report generated automatically at Field Offices. However, Field Offices can access this report on MTCS anytime.



PHAs should review the "On Hand Percent" column to determine reporting rates for Public Housing and Section 8 Certificates and Vouchers.



Access HA Delinquency report

Multifamily Tenant Characteristics System
Main Menu

Enter the following information, then click on the GO button.

☒ **MTCS Reports**

☐ **Ad Hoc Selection**

If you select "Transmission Status...", enter HA Mailbox ID.
If you select "Send File", enter both HA Mailbox ID and Return Mailbox ID.

☐ **Transmission Status, Error Report, or Analysis Report** HA Mailbox ID

☐ **Send File** Return Mailbox ID

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[MTCS Website](#)

To retrieve the **HA Delinquency report**:

- Select **MTCS Reports** from the *Main Menu* (**MTCS Reports** is the default selection)
- Click **GO**

The *Selection Menu* appears on your screen.



Selection Menu

**Multifamily Tenant Characteristics System
Selection Menu**

Program Selection

| | |
|------------------------------|-------------------------------------|
| Public Housing | <input checked="" type="checkbox"/> |
| Indian Mutual Help | <input type="checkbox"/> |
| Indian Rental | <input type="checkbox"/> |
| S8 Certificates | <input type="checkbox"/> |
| S8 Vouchers | <input type="checkbox"/> |
| S8 Moderate Rehabilitation | <input type="checkbox"/> |
| All Offices of PIH Programs | <input type="checkbox"/> |
| Public and Indian Housing | <input type="checkbox"/> |
| Indian Housing | <input type="checkbox"/> |
| S8 Vouchers and Certificates | <input type="checkbox"/> |

Level of Information

- ☐ National
- ☐ State
- ☐ Field Office
- ☐ MSA
- ☐ County
- ☐ City or Locality
- ☐ Housing Agency
- ☐ Project
- ☐ Congressional District

To make selections for the HA Delinquency report :

- Select a **Program** from the *Selection Menu* (**Public Housing** is the default program selection)
- Select **Field Office** from the **Level of Information** from the *Selection Menu*

The *Selection Menu* remains on your screen.



The **HA Delinquency report** is located under Detailed reports. You can access data in the Detailed reports when you select a single program from the Program Selection list. Single programs include: Public Housing, Indian Mutual Help, Indian Rental, Section 8 Certificates, Section 8 Vouchers, Section 8 Moderate Rehabilitation. No matter what program you select, you will obtain data for both Public Housing and Section 8.



You cannot access the **HA Delinquency report** located under Detailed reports when you select a combined program from the Program Selection list. Combined programs include: All Offices of PIH Programs, Public and Indian Housing, Indian Housing, Section 8 Certificates and Vouchers.



On the *Selection Menu* screen, MTCS will prompt you to select additional levels of information to further narrow your search parameters based on the **Level of Information** you selected.

- Select the **Field Office**
- Click **Report Menu**

The *Report Menu* appears on your screen.



Hold down the **Ctrl** key on your keyboard and use the mouse to make multiple selections. You can only make multiple selections for the last level of information selected before you click *Report Menu*. You can view and print up to four selections from the level of information on a single page.



Reports Menu

**Multifamily Tenant Characteristics System
Reports Menu**

| Summary Reports (All) | Summary Reports (Section 8) | Detailed Reports |
|--|---|---|
| <u>Resident Characteristics</u> | <u>Rent and Rent Burden</u> | <u>Housing Agency Delinquency</u> |
| <u>Key Management Indicators</u> | <u>Budget Related Averages</u> | |
| <u>New Admissions</u> | <u>Special Housing Types</u> | |
| <u>Families Ending Participation</u> | <u>Mobility and Portability</u> | |
| <u>Over- and Under-housed</u> | | |
| <u>Program Type</u> | | |
| <u>Citizenship</u> | | |
| <u>Income</u> | | |
| <u>FSS Enrollments</u> | | |
| <u>FSS Enrollee Progress</u> | | |
| <u>FSS Delinquencies</u> | | |
| <u>FSS Exits</u> | | |

To view the report:

- Select **Housing Agency Delinquency** report from the *Report Menu*

The **HA Delinquency** report appears on your screen.

- Locate the PHA you want to evaluate from the list in the report



If the PHA's name does not appear on the first page, click **Next** at the bottom of the screen to view the next list of PHAs in the report.



The list of reports available depends on the Program and the Level of Information you selected. For example, if you select Public Housing, MTCS will not display the Section 8 Summary reports.



Detail reports are not available at the Field Office Level except for the Housing Agency Delinquency report.



Key data fields

- Total Units Available
- Total Units Occupied
- On Hand Percent
- Forms Received Last Month, 3 Months, and 6 Months

To identify the PHA's reporting rate, the PHA should review key data fields in the **HA Delinquency report**.

Total Units Available includes total number of available Public Housing units from IBS and total number of Section 8 contracted units from HUDCAPS.

Total Units Occupied includes total number of Public Housing occupied units from the IBS and total number of Section 8 occupied units from HUDCAPS.

On Hand Percent includes the total number of households with an effective date of action within the last 18 months regardless of transmission date.

Forms Received Last Month, 3 Months, and 6 Months includes total number of households reported within the last month, 3 months, and 6 months.



HUDCAPS receives data from the PHA's Year-End-Statement. IBS receives data from the Form HUD-51234. MTCS receives data from HUDCAPS quarterly and IBS weekly.



Reporting rates are measured against "Total Units Occupied." You should review the "On Hand Percent" column to determine the PHA's reporting rate.



Small group exercise

Situation #2:

A colleague wants an analysis of a PHA's reporting rate in your jurisdiction.

What would you tell them?



More information

- Ad Hoc reports
- Error notifications

If a PHA has low reporting rates, you should recommend they:

- Run an **Ad Hoc report** to identify which families are in the MTCS database. The PHA can compare families listed in the Ad Hoc report with their own records. This will help the PHA identify families for which the PHA may need to transmit an action, such as new admission, end of participation, or portability move-out.
- Check **Error notifications** to ensure they correct all fatal errors and resubmit their corrected Form HUD-50058s.



Field Office inquiry #3

The Field Office Director calls you and says:

"One of our PHAs has a high reporting rate but I suspect that the PHA has not transmitted families recently."



Key Management Indicators

- Provides information on PHA activities
- Identifies possible discrepancies

In order to obtain information on the quality and quantity of a PHA's activities reported to MTCS, you should access the **Key Management Indicators** report. It:

- Provides information on various PHA activity, which includes descriptive data related to PHA policies
- Identifies possible discrepancies within each discrepancy category



Access Key Management Indicators report

Multifamily Tenant Characteristics System
Main Menu

Enter the following information, then click on the GO button.

☒ **MTCS Reports**

☐ **Ad Hoc Selection**

If you select "Transmission Status...", enter HA Mailbox ID.
If you select "Send File", enter both HA Mailbox ID and Return Mailbox ID.

☐ **Transmission Status, Error Report, or Analysis Report** HA Mailbox ID

☐ **Send File** Return Mailbox ID

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| [MTCS Website](#) |

To retrieve the **Key Management Indicators** report:

- Select **MTCS Reports** from the *Main Menu* (**MTCS Reports** is the default selection)
- Click **GO**

The *Selection Menu* appears on your screen.



Selection Menu

Multifamily Tenant Characteristics System
Selection Menu

Program Selection

| | |
|------------------------------|-------------------------------------|
| Public Housing | <input checked="" type="checkbox"/> |
| Indian Mutual Help | <input type="checkbox"/> |
| Indian Rental | <input type="checkbox"/> |
| S8 Certificates | <input type="checkbox"/> |
| S8 Vouchers | <input type="checkbox"/> |
| S8 Moderate Rehabilitation | <input type="checkbox"/> |
| All Offices of PIH Programs | <input type="checkbox"/> |
| Public and Indian Housing | <input type="checkbox"/> |
| Indian Housing | <input type="checkbox"/> |
| S8 Vouchers and Certificates | <input type="checkbox"/> |

Level of Information

- ☐ National
- ☐ State
- ☐ Field Office
- ☐ MSA
- ☐ County
- ☐ City or Locality
- ☐ Housing Agency
- ☐ Project
- ☐ Congressional District

To make selections for the Key Management Indicators report:

- Select a **Program** from the *Selection Menu* (**Public Housing** is the default program selection)
- Select **Housing Agency** from the **Level of Information** from the *Selection Menu*

The *Selection Menu* remains on your screen.



On the *Selection Menu* screen, MTCS will prompt you to select additional levels of information to further narrow your search parameters based on the **Level of Information** you selected.

For example, when you select Housing Agency from the **Level of Information**, you have the option to select the following in the *Selection Menu* screen. Each option will generate a different result:

- Within a State: tenant data for the area of the PHA within the state you select
- Within a State and County: tenant data for the area of the PHA within a county, within the state you select
- Within a Field Office: tenant data within a Field Office you select

Each selection will require you to make additional selections:

- Select one or more PHAs from the **HA List**

Click **Report Menu**

The *Report Menu* appears on your screen.



Hold down the **Ctrl** key on your keyboard and use the mouse to make multiple selections. You can only make multiple selections for the last level of information selected before you click *Report Menu*. You can view and print up to four selections from the level of information on a single page.



| Reports Menu | | |
|---|--|--|
| Multifamily Tenant Characteristics System Reports Menu | | |
| Summary Reports (All) | Summary Reports (Section 8) | Detailed Reports |
| Resident Characteristics | Rent and Rent Burden | Eligibility and Admissions Discrepancy |
| Key Management Indicators | Budget Related Averages | List of New Admissions |
| New Admissions | Special Housing Types | Unit Assignments Discrepancy |
| Families Ending Participation | Mobility and Portability | Late Reexamination Discrepancy |
| Over- and Under-housed | | Late HQS Inspection Discrepancy |
| Program Type | | Tenant Rent Calculation Discrepancy |
| Citizenship | | |
| Income | | |
| FSS Enrollments | | |
| FSS Enrollee Progress | | |
| FSS Delinquencies | | |
| FSS Exits | | |

To view the report:

- Select **Key Management Indicators** report from the *Report Menu*

The **Key Management Indicators** report appears on your screen.



The list of reports available depends on the Program selection. For example, if you select Public Housing, MTCS will not display the Section 8 Summary reports.



The Housing Agency Delinquency report is not available at the HA level.



Key data fields

- Distribution by Families Reported
- Rent Discrepancies
- Other Types of Discrepancies
- Family Self-Sufficiency (FSS)

You can evaluate the characteristics of a PHA and their actions reported to MTCS based on key data fields in the **Key Management Indicators** report.

Distribution by Families Reported details the actions reported by the PHA during the last 12 months.

Rent Discrepancies identifies the number of families whose rent payments are under or over MTCS calculated rent.

Other Types of Discrepancies identifies the percentage of families within each discrepancy category: Admissions of over-income families, over housed, under housed, late reexaminations, and late HQS inspections.

Family Self-Sufficiency (FSS) data show how many and the percent of all families a PHA enrolled in the FSS program.



Small group exercise

Situation #3:

HUD Headquarters suspects that some PHAs have a high reporting rate, but have reported no reexaminations in the last six months.

Check three PHAs in your jurisdiction and return the call to Headquarters with your findings.



More Information

- Late Reexamination Discrepancy
- Late HQS Inspection Discrepancy
- Tenant Rent Calculation Discrepancy
- Eligibility and Admissions Discrepancy
- Unit Assignments

You can view other reports to obtain more information about fields on the Key Management Indicators report.

Late Reexamination Discrepancy report provides a list of families for which the PHA did not submit a reexamination in the last 15 months.

Late HQS Inspection Discrepancy report provides a list of families for which the PHA did not submit a Housing Quality Standards (HQS) inspection in the last 15 months or within the projected next reexamination date.

Tenant Rent Calculation Discrepancy report provides a list of households, the PHA reported rent, MTCS calculated rent, and the amount of over or under charge. MTCS reports all calculated rents that differ from reported rents by more than \$10 as a discrepancy.

Eligibility and Admissions Discrepancy report provides a list of households identified as over income or inappropriately housed at admission.

Unit Assignments Discrepancy Report provides a list of families who are under or over housed.



Field Office inquiry #4

A colleague calls you and says:

"I notice that one of our PHAs has a low reporting rate. The Key Management Indicators report indicates a high percentage of late reexaminations. What should I do to find more information?"



Late Reexamination Discrepancy report

- Identifies families for which the PHA did not submit a reexamination in last 15 months
- Provides projected date of next reexamination

PHAs who do not transmit reexaminations in a timely manner may have low reporting rates. The Late Reexamination report identifies families for which the PHA has not transmitted a reexamination in the past 15 months.



Access Late Reexamination Discrepancy reports

Multifamily Tenant Characteristics System
Main Menu

Enter the following information, then click on the GO button.

☒ **MTCS Reports**

☐ **Ad Hoc Selection**

If you select "Transmission Status...", enter HA Mailbox ID.
If you select "Send File", enter both HA Mailbox ID and Return Mailbox ID.

☐ **Transmission Status, Error Report, or Analysis Report** HA Mailbox ID

☐ **Send File** Return Mailbox ID

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[MTCS Website](#)

To retrieve the **Late Reexamination Discrepancy** report:

- Select **MTCS Reports** from the *Main Menu* (**MTCS Reports** is the default selection)
- Click **GO**

The *Selection Menu* appears on your screen.



Selection Menu

**Multifamily Tenant Characteristics System
Selection Menu**

Program Selection

| | |
|------------------------------|---|
| Public Housing | ▼ |
| Indian Mutual Help | |
| Indian Rental | |
| S8 Certificates | |
| S8 Vouchers | |
| S8 Moderate Rehabilitation | |
| All Offices of PIH Programs | |
| Public and Indian Housing | |
| Indian Housing | |
| S8 Vouchers and Certificates | |

Level of Information

- ☐ National
- ☐ State
- ☐ Field Office
- ☐ MSA
- ☐ County
- ☐ City or Locality
- ☐ Housing Agency
- ☐ Project
- ☐ Congressional District

To make selections for the **Late Reexamination Discrepancy report**:

- Select a **Program** from the *Selection Menu* (**Public Housing** is the default program selection)
- Select **Housing Agency** from the **Level of Information** from the *Selection Menu*

The *Selection Menu* remains on your screen.



The **Late Reexamination Discrepancy report** is located under Detailed reports. You can access data in Detailed reports when you select a single program from the Program Selection list. Single programs include: Public Housing, Indian Mutual Help, Indian Rental, Section 8 Certificates, Section 8 Vouchers, Section 8 Moderate Rehabilitation.



You cannot access the **Late Reexamination Discrepancy report** located under Detailed reports when you select a combined program from the Program Selection list. Combined programs include: All Offices of PIH Programs, Public and Indian Housing, Indian Housing, Section 8 Certificates and Vouchers.



On the *Selection Menu* screen, MTCS will prompt you to select additional levels of information to further narrow your search parameters based on the **Level of Information** you selected.

For example, when you select **Housing Agency** from the **Level of Information**, you have the option to select the following in the *Selection Menu* screen. Each option will generate a different result:

- Within a State: tenant data for the area of the PHA within the state you select
- Within a State and County: tenant data for the area of the PHA within a county, within the state you select
- Within a Field Office: tenant data within a Field Office you select

Each selection will require you to make additional selections:

- Select one or more PHAs from the **HA List**

Click **Report Menu**

The *Report Menu* appears on your screen.



Hold down the **Ctrl** key on your keyboard and use the mouse to make multiple selections. You can only make multiple selections for the last level of information selected before you click *Report Menu*. You can view and print up to four selections from the level of information on a single page.



Reports Menu

Multifamily Tenant Characteristics System

Reports Menu

| Summary Reports | Summary Reports | Detailed Reports |
|---|--|--|
| (All) | (Section 8) | |
| Resident Characteristics | Rent and Rent Burden | Eligibility and Admissions Discrepancy |
| Key Management Indicators | Budget Related Averages | List of New Admissions |
| New Admissions | Special Housing Types | Unit Assignments Discrepancy |
| Families Ending Participation | Mobility and Portability | Late Reexamination Discrepancy |
| Over- and Under-housed | | Late HQS Inspection Discrepancy |
| Program Type | | Tenant Rent Calculation Discrepancy |
| Citizenship | | |
| Income | | |
| FSS Enrollments | | |
| FSS Enrollee Progress | | |
| FSS Delinquencies | | |
| FSS Exits | | |

To view the report:

- Select **Late Reexamination Discrepancy** from the *Report Menu*

The **Late Reexamination Discrepancy** report appears on your screen.



The list of reports available depends on the Program selection. For example, if you select Public Housing, MTCS will not display the Section 8 Summary reports.



The Housing Agency Delinquency report is not available at the HA level.



More information

- Ad Hoc
- Error notifications

If the PHA questions why they have late reexaminations, you should recommend they:

- Run an **Ad Hoc report** to identify which families are in the MTCS database. The PHA can compare families listed in the Ad Hoc report with their records. This will help the PHA identify families for which the PHA may need to transmit a reexamination.
- Check **Error notifications** to ensure they correct all fatal errors and submit their corrected Form HUD-50058s.



Group exercise

Situation #4:

You want to check the PHAs identified in the Key Management Indicators report that have late reexaminations.

What do you do?



Field Office inquiry #5

A Public Housing Agency calls you and asks:

"I submitted all my family data to MTCS; how can I confirm what families are in the database?"



Ad Hoc reports

- Allow you to generate customized reports from a subset of Form HUD-50058 data
- Provide data transmitted for a family's Form HUD-50058 fields

PHAs who want to identify which families are in MTCS can generate an **Ad Hoc report** to compare the raw data in MTCS with their own records. Field Offices and TARC's can generate Ad Hoc reports to monitor PHA performance. Ad Hoc allows you to:

- Generate customized reports from a subset of Form HUD-50058 data
- Confirm families in MTCS
- Select data fields for comparison and analysis that are not contained in a single report
- Highlight irregularities in data combinations that would otherwise go undetected on reports with predetermined formats
- Import data into other software packages (e.g., spreadsheet or database) to produce graphs, charts, and tables for more detailed analysis



Ad Hoc selection

Multifamily Tenant Characteristics System
Main Menu

Enter the following information, then click on the GO button.

☐ MTCS Reports

☒ **Ad Hoc Selection**

If you select "Transmission Status...", enter HA Mailbox ID.
If you select "Send File", enter both HA Mailbox ID and Return Mailbox ID.

☐ Transmission Status,
Error Report, or
Analysis Report HA Mailbox ID

☐ Send File Return Mailbox ID

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To retrieve an **Ad Hoc report**:

- Select **Ad Hoc Selection** from the *Main Menu*
- Click **GO**

The *Ad Hoc Selection Menu* will appear on your screen.



Ad Hoc selection menu

Multifamily Tenant Characteristics System
Ad Hoc Selection Menu

Program Selection

- ☐ Public Housing
- ☐ Indian Rental
- ☐ Indian Mutual
- ☐ Certificate
- ☐ Voucher
- ☐ Mod Rehab
- ☐ Certificate and Voucher
- ☐ All

Level of Information

- ☐ Field Office
- ☐ Housing Agency
- ☐ Project

To query all families for a specific PHA:

- Select **All** from the **Program Selections** from the *Ad Hoc Selection Menu*
- Select **Housing Agency** from the **Level of Information** from the *Ad Hoc Selection Menu*

You have the option to select the following. Each option generates a different result:

- Within a State: tenant data for the area of the PHA within the state you select
- Within a Field Office: tenant data for the area of the PHA within the Field Office you select

Each selection will require you to make additional selections.

- Click **Next**



Check boxes allow you to select multiple **Programs**. Radio buttons allow you to select only one **Level of Information**.



Ad Hoc selection menu

Multifamily Tenant Characteristics System
Ad Hoc Selection Menu

| | |
|--|--|
| Type of Action Selection <input type="checkbox"/> New Admission <input type="checkbox"/> Reexamination <input type="checkbox"/> Interim Reexamination <input type="checkbox"/> Portability Move-ins <input type="checkbox"/> Portability Move-outs <input type="checkbox"/> End of Participation <input type="checkbox"/> Other Change of Unit <input type="checkbox"/> All | Effective Date of Action From (MM/DD/YYYY) <input style="width: 100px;" type="text"/> To (MM/DD/YYYY) <input style="width: 100px;" type="text"/> Sorting Requirement <input type="radio"/> By Social Security Number <input checked="" type="radio"/> By Head of Household's Last Name <input type="radio"/> By Effective Date <div style="text-align: center;"> <input type="button" value="Go To Field Selection"/> </div> |
|--|--|

To find all the families in the PHA:

- Select **All** from the **Type of Action** from the *Ad Hoc Selection Menu*
- Leave **Effective Date of Action** fields empty
- Leave **Sorting Requirement** defaulted to *Head of Household's Last Name* (The sorting requirement determines in which order the data appears in the report)
- Click **Go To Field Selection**

The *Ad Hoc Field Selection Menu* appears on your screen



If you want to limit your time parameter, you should enter the date with a four-digit year (MM/DD/YYYY) in the Effective Date of Action fields. If you do not enter dates, you will receive all 18 months of family data in the MTCS database that match the selection criteria.



Check boxes allow you to select multiple **Type of Action**. Radio buttons allow you to select only one **Sorting Requirement**.



Ad Hoc field selection menu

Multifamily Tenant Characteristics System
Ad Hoc Field Selection Menu

| <i>Select one of the following data output options</i> | |
|--|---|
| <input type="radio"/> Download data in zip format (<i>Default</i>) | <input checked="" type="radio"/> Display data on screen |
| <i>Select the fields</i> | |
| <i>Field Description</i> | <i>Form Field Number</i> |
| <input type="checkbox"/> All Fields | --- |
| <input type="checkbox"/> HA Code | 1b+1c |
| <input type="checkbox"/> Program | 1d |
| <input type="checkbox"/> Project Number | 1e+1f+1g |
| <input type="checkbox"/> Site Number | 1h |
| <input type="checkbox"/> Type of action | 2a |
| <input type="checkbox"/> Effective date of action | 2b |
| <input type="checkbox"/> Date of admission to program | 2c |

To view the report:

- Select **Display data on screen** from the *Ad Hoc Field Selection Menu* (**Display data on screen** is the default selection)

Display allows you to view or print the report on your screen.

Select the **data fields** you want to generate from the *Ad Hoc Field Selection Menu*:

- Select **Program**
- Select **Project Number**
- Select **Type of Action**
- Select **Effective Date of Action**
- Select **Head of Household Last Name & Sr, Jr, etc..**
- Select **Head of Household First Name**
- Select **Head of Household Social Security Number**
- Click **Run Query**

Ad Hoc will generate the report.



Ad Hoc tips

- Limit the effective date of action to a smaller time period, e.g. three or six months
- Narrow the program and type of action selection, e.g. two or three
- Choose only essential Form HUD-50058 fields

When you narrow your selections, you reduce the size of the Ad Hoc report and reduce download problems.



Small group exercise

Situation #5:

You received a call from Fair Housing and Equal Opportunity (FHEO) who want to know if your PHA fulfilled requests for accessibility features for families in their program.

What would you do to obtain this information for one of your PHAs?



Additional resources

- MTCS Web Reports Guide
- MTCS Reports Monitoring Guide
- Forums
- MTCS Hotline

For more information on MTCS, please review:

MTCS Web Reports Guide provides step-by-step instructions on how to access, retrieve, and print MTCS reports and detailed definitions of report data fields and error notifications via the Internet

MTCS Reports Monitoring Guide provides HUD staff and Public Housing Agencies with information and examples that show how to use MTCS reports

Forums are an interactive arena where MTCS users post questions, comments, or concerns. The forums provide a vehicle for two-way exchange of information.

MTCS Hotline can answer questions you may have about FRS 2.0, data transmission, error reports, and MTCS reports. The MTCS Hotline is available Monday through Friday from 8:00 a.m. to 8:00 p.m. (EST) and Saturday through June 26 from 8:00 a.m. to 2:00 p.m. (EST). You can contact the Hotline at: 1-800-FON-MTCS (1-800-366-6827)